

TOWN OF WEST BOYLSTON

REQUEST FOR PROPOSALS .
FINANCIAL SERVICES

The Town of West Boylston seeks proposals from qualified financial management/accounting firms to serve as the Town's Finance Director/Town Accountant.

Request for Proposals and Proposal Forms may be obtained from the Office of the Town Administrator, Town of West Boylston, 127 Hartwell Street, Ste. 100, West Boylston, MA 01583 during normal business hours. Sealed proposals, clearly marked "West Boylston Financial Services" must be received by 2:00 P.M. on March 25, 2011 in the Office of the Town Administrator.

The Town Administrator will review the applications and bring forward a recommendation to the Board of Selectmen for award of the contract. The Town reserves the right to reject any and all proposals, wholly or in part, and make such award as it determines to be in the best interest of the Town of West Boylston.

Town of West Boylston

LEON A. GAUMOND JR.
Town Administrator

TOWN OF WEST BOYLSTON

REQUEST FOR PROPOSALS - FINANCIAL SERVICES

I. General Information

The Town of West Boylston seeks proposals from qualified financial management/accounting firms to serve as the Town's Finance Director/Town Accountant.

All interested parties must submit seven (7) copies of their proposals containing complete information as requested in the PROPOSAL SUBMISSION REQUIREMENTS described herein 2:00 P.M. on March 25, 2011 in the Office of the Town Administrator.

II. Project Description

The Town has a need to fill the vacancy in the office of the statutory Town Accountant so as to discharge the duties contained in Massachusetts General Laws, Chapter 41, Sections 55 through 61, et al, for the proper and prudent management of the financial affairs of the municipality of the Town of West Boylston. The Town has determined that it needs professional financial management services for the prudent and proper supervision of the financial affairs of the municipality. In such, the Town is seeking a consultant, for a term up to three years, who is experienced, competent and learned in public sector financial and legal matters, and well qualified to advise and assist the Town in the provision of town accountant and financial management services.

III. Scope of Services

The Consultant shall perform the necessary professional services required by the Town in the areas of town accountant and financial management services in a professional, competent, and expeditious manner under the direction of the Town Administrator.

- A. The Consultant shall act as the statutory Town Accountant of the Town of West Boylston in conformity with the provisions of the Massachusetts General Laws, including, but limited to General Laws, Chapter 41, Sections 55 through 61, inclusive, et al, and the bylaws of the Town of West Boylston;
- B. Provide administrative and financial management services for the proper and efficient operation of West Boylston, as well as the Office of Financial Management;

- C. In conjunction with the Town Administrator, provide supervision and direction to the Office of Financial Management consisting of the Office of the Town Accountant, Office of the Treasurer/Tax Collector, and the Office of the Board of Assessors; interview prospective personnel and consultants assigned to the Office of Financial Management and for other related positions and makes hiring and contract award recommendations to the appropriate hiring or contract awarding authority, e.g., the Town Administrator, the Board of Assessors, etc; establishes performance and training goals for assigned personnel; conducts performance and personnel evaluations and reviews; and recommends appropriate personnel action;
- D. Under the auspices of the Town Administrator prepare monthly financial statements in conformity with the bylaws of the Town of West Boylston, in a format approved by the Town Administrator;
- E. Examine and approve all municipal payrolls and schedules of bills payable, and prepare bi-weekly payroll warrants and bills payable warrants authorizing payment by the Treasurer/Tax Collector;
- F. In conjunction with and as directed by the Town Administrator, participate in the annual municipal budget preparation process, including, but not limited to: (1) preparing reports and projections on expenditures and revenues; (2) preparing reports and projections on capital expenditures and needs; (3) prepares reports and projections on debt; and (4) preparing recommendations on municipal financial matters;
- G. In conjunction with the Town Administrator, under the auspices of the Board of Selectmen, responsible for administering group health plans, employee benefit programs, and employee retirement plans; and administering a personnel administration record keeping system;
- H. When necessary, assist the Town Administrator with the development and administration of procurement policies, procedures and management systems in conjunction with other municipal departments, boards, commissions and committees, including the West Boylston School Department, and as appropriate, with other municipalities, the Commonwealth of Massachusetts and other agencies;
- I. In conjunction with the Town Administrator develop, recommend and implement financial management and procurement policies required for the prudent and proper management of the municipality's finances, and as required by the bylaws of the Town of West Boylston and the Board of Selectmen;
- J. In conjunction with the Town Administrator, develop a professional and proficient organizational plan for the Office of Financial Management

through: (1) the development of comprehensive and detailed standard operating procedures and internal controls; (2) establishment of objectives, goals, performance standards, and assignments for the officials and employees of the Office of Financial Management; and (3) evaluation of operations and staff levels to ensure compliance with all applicable laws, rules, regulations, bylaws, policies, and departmental goals and operational standards;

- K. Perform all duties required of subordinates when necessary, and performs all related duties and assignments as may be determined and directed by the Town Administrator to properly manage the financial affairs of the municipality;
- L. Act as the Chief Financial Officer of the municipality, and represents the municipality, the Board of Selectmen and Town Administrator, as required.
- M. Perform other financial duties as may be required during the three pending fiscal years.

IV. Evaluation Criteria

Evaluation of proposals will be based upon information provided in the proposals, obtained from references and from other generally available and verifiable information. The Town reserves the right to request clarification of proposal terms or additional information after the Submission Deadline.

Proposals will be evaluated based upon Minimum and Comparative Criteria. The Town will begin negotiations with the proposer who submits the most advantageous proposal based on consideration of specified Minimum and Comparative Criteria.

1. Minimum Criteria: Each proposal must meet the following criteria in order to be considered for further evaluation:

- 1. All necessary professional registration and licensing in all applicable disciplines (Certified Government Accountant, GFOA, etc.)
- 2. Thorough knowledge of the Massachusetts municipal financial statutes and regulations governing municipal entities.
- 3. Experience serving as a statutory town accountant in Massachusetts for a minimum of 5 years.

4. Maintain sufficient levels of staff to complete the project in an acceptable time frame.
5. Must have prior to signing of the contract:
 - a. Professional liability insurance of \$1,000,000.00, or such other higher amount as may be agreed to during contract negotiations.
 - b. Workers' Compensation insurance in accordance with all applicable state laws.

2. Comparative Criteria: The following Comparative Criteria will be applied to those proposals that meet the Minimum Criteria listed above. Proposals that do not meet the Minimum Criteria will be judged unacceptable and not reviewed any further. The Town will consider the following Comparative Criteria and evaluate each proposal based on the preferences listed below:

A. Experience of Service to other Massachusetts Municipalities

- Highly Advantageous: Service to a number of Massachusetts Municipalities as a Finance Director/Town Accountant of various sizes and needs (more than 7).
- Advantageous: Service to a number of Massachusetts Municipalities as a Finance Director/Town Accountant of various sizes and needs (more than 4).
- Not Advantageous: Service to less than 4 Massachusetts Municipalities as a Finance Director/Town Accountant of various sizes and needs.

B. Experience with Sewer System management/reporting

- Highly Advantageous: Experienced service to a number of Massachusetts Municipalities as a Finance Director/Town Accountant with responsibilities for a municipal sewer department
- Advantageous: Experienced service to a municipalities as a Finance Director/Town Accountant with responsibilities for a municipal sewer department
- Non-Advantageous: No experienced service to a number of Massachusetts Municipalities as a Finance

Director/Town Accountant with responsibilities
for a municipal sewer department

C. Ability to staff regular office hours in Town Hall

Highly Advantageous: Ability to staff municipal offices three or more
days a work week during normal business hours
Advantageous: Ability to staff municipal offices one or two
days a work week during normal business hours
Non-Advantageous: No ability to staff municipal offices during
normal business hours

V. Proposal Submission Requirements.

1. Seven (7) copies of the proposal shall be submitted no later than _
2:00 p.m. on March 25, 2010. Proposals should be submitted to and
addressed as follows:

Town of West Boylston
C/O Town Administrator
127 Hartwell Street, Ste. 100
West Boylston, MA 01583

Re: West Boylston Financial Services

Postmarks will not be considered. It is the sole responsibility of the
proposer to insure that its proposal arrives on time at the designated
place.

2. The Proposal should be submitted in a sealed envelope clearly
marked on the outside as follows:
“West Boylston Financial Services”
3. The Fee Proposal must be submitted in a separate, sealed envelope
clearly marked on the outside as follows:
“West Boylston Financial Services – Fee Proposal”
4. Complete proposals must include the following:
 - a. A list of five current and past communities where similar
services would have been provided with the name and
telephone number of reference person to contact. The
description should include the scope of work and the extent of
your involvement with the community. Submission should
also include the dates of service.

- b. A general company/firm profile or brochure and list of key personnel who will participate on this project with resumes included.
- c. The identification of any and all consultants who will work with the applicant with resumes attached. Please identify the individual who will bear primary responsibility for this project.
- d. Documentation of “Minimum Qualifications” as set forth above.
- e. Conditions of proposal offered, if any; and
- f. Any other information that the applicant considers relevant for the purpose of evaluating its qualifications for the project.

VI. Selection Process.

1. In evaluating proposals, the Town of West Boylston will review all proposals and base its selection on the following criteria:
 - a. Prior experience with similar projects.
 - b. Past performance on previous similar projects and working knowledge of the Massachusetts General Laws relating to municipal finance.
 - c. Financial stability of the proposer.
 - d. Professional qualifications of staff and consultants who will work on the project.
 - e. Current workload or clearly established capacity to complete scope of work on a qualitative, timely basis.
 - f. Completeness of proposal submitted by each firm: and
 - g. Any other criteria considered relevant to the project.
2. The RFP is being solicited under section 6 of Chapter 30B of the Massachusetts General Laws. All proponents are required to submit separately sealed technical proposals and price proposals. The Town will first open the technical proposals. An Evaluation

Team appointed by the Town Administrator will evaluate and rank the proposals based on the evaluation criteria outlined in Section IV – Evaluation Criteria. Interviews may be held if the Evaluation Team feels it is the Town’s best interest to do so. After the completion of the evaluation of the technical proposals, the Town will open the price proposals. The chief procurement officer shall award the contract to the most advantageous proposal from a responsible and responsive offer or taking into consideration price, the evaluated criteria set forth in the request for proposals, and the terms of the negotiated contract.

3. During the evaluation and interview process, the Town of West Boylston reserves the right to request additional information or clarification from any proposer, or to allow corrections of errors or omissions.

VII. General and Special Provisions.

1. The Town of West Boylston reserves the right to reject any and all proposals, waive informalities, and to recommend the award of a contract as may be in the best interest of the Town of West Boylston.
2. The Consultant selected shall be expected to comply with all applicable federal and state laws in the performance of services.
3. The consideration of all proposals and subsequent selection of the successful proposal shall be made without regard to race, color, sex, age, handicap, religion, political affiliation or natural origin.
4. The Consultant shall adhere to the provisions of the Fair Employment Practices Law of the Commonwealth of Massachusetts (Chapter 151 B of the Massachusetts General Laws).
5. The provisions relating to nondiscrimination and affirmative action in employment shall follow through all contacts and subcontracts that the successful applicant may receive or award as a result of this contract.
6. Prospective applicants who have any questions regarding this Request for Proposals should contact:

Leon A. Gaumond Jr., Town Administrator
Town of West Boylston
127 Hartwell Street, Ste. 100
West Boylston, MA 01583

All inquiries must be made in writing, responses will be sent to all

proposers of record.

Requests for Information (RFI) submitted: March 9, 2011,
Answers to RFI Faxed or e-mailed to participants: March 11, 2011
(2 days later).

Proposal due date (by 2:00 P.M.): March 25, 2011 (fourteen days later)
Anticipated Date of Award (estimated): July 1, 2011, funding subject to
appropriation by Town Meeting.

VIII. Certification of Non Collusion and Tax Compliance.

A “Certificate of Non-Collusion” and “Certificate of State Tax Compliance” must be signed and included with the proposal (forms attached).

IX. Termination of Agreement

In addition, the Town may terminate this contract at any time for its convenience upon thirty (30) days notice. This Agreement is also subject to an available appropriation. In the event the town fails to appropriate or make available sufficient funds to support the continuation of this Agreement in subsequent fiscal years, the Town shall cancel the Agreement.

CERTIFICATE OF TAX COMPLIANCE

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A(b), I,
_____, authorized signatory for _____, do hereby
certify under the pains and penalties of perjury that said contractor has complied with all
laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees
and contractors, and withholding and remitting child support.

Signature

Name: _____

Title: _____

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

DATE:_____

BY:_____
Name of person signing bid or proposal

SEAL if proposer is by corporation

Name of business

Address
City State Zip

Telephone